

# Presentation to Baltimore Data Day:

Capturing Community Strengths and Opportunities in  
Urban Markets

The Jacob France Institute's Approach to Community  
Economic Analysis

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# What we will discuss:

Goal: A Primer on Economic and Workforce Development Analysis at the Neighborhood Level

1. Some Uses of Neighborhood Economic and Workforce Development Analysis
  - JFI Examples
2. National Data Sets
  - Best Data is Only/Mostly Available for Larger Areas
3. Community Level Data Sets
  - Some National Data Available – **FREE** 😊 – (LEHD Data – Most Exciting)
  - Other Data – Commercial Databases – **NOT FREE** 😞 – (Claritas, Business Databases)
  - Some Estimation Techniques
4. Importance of Original Data Collection

# Uses of Neighborhood Economic and Workforce Development Analysis

## Why Bother?

Because many of the Most Important Issues facing Baltimore City are  
Economic in Nature – Jobs, Income, Unemployment, Development, Land-  
Use

## Some Examples of JFI Work (We Focus on Community, Economic and Workforce Development):

- Supermarket Demand
  - If you build it – Will they come?
- Red Line / EBDI / Four Seasons / UMB BioPark
  - If you build it – Will you employ **US**?
    - Baltimore is a TRUE Leader Here!
- Walker Development 25<sup>th</sup> and Howard Street Project
  - If you build it – What does it mean for the City?

# Community Economic and Workforce Development Supply and Demand Analysis – Red Line Study

**Table 8**  
**Construction Jobs Created by the Construction of the Red Line by Year by Level of Education and Training Required**  
(# of Jobs)

Education Level/ Year	Design and Planning Phase (3 Year)	Construction Phase (4 Year)	Total
Total	<u>1,307</u>	<u>8,494</u>	<u>9,801</u>
First Professional Degree	31	28	58
Doctoral Degree	1	1	3
Master's Degree	23	26	48
Degree plus work Experience	91	284	376
Bachelor's Degree	281	712	994
Associate Degree	67	86	152
Postsecondary vocational award	78	273	351
Work experience in a related occupation	94	877	971
Long-term on-the-job training	72	926	998
Moderate-term on-the-job training	439	4,482	4,922
Short-term on-the-job training	128	799	927
Unallocated	0	0	0
% of Total	<u>100%</u>	<u>100%</u>	<u>100%</u>
First Professional Degree	2%	0%	1%
Doctoral Degree	0%	0%	0%
Master's Degree	2%	0%	0%
Degree plus work Experience	7%	3%	4%
Bachelor's Degree	22%	8%	10%
Associate Degree	5%	1%	2%
Postsecondary vocational award	6%	3%	4%
Work experience in a related occupation	7%	10%	10%
Long-term on-the-job training	6%	11%	10%
Moderate-term on-the-job training	34%	53%	50%
Short-term on-the-job training	10%	9%	9%
Unallocated	0%	0%	0%

Source: JFI

**Table 16**  
**Educational Attainment - Red Line Communities**

Educational Attainment Indicators	Total Baltimore City	Redline Baltimore City	Redline Baltimore County	Total Redline
Persons Aged 25+	403,013	81,084	17,657	98,741
Less than 9th Grade	37,235	9,229	936	10,165
Some High School (No Diploma)	87,758	19,438	1,707	21,145
High School Graduate	112,402	22,050	5,156	27,206
Some College (No Degree)	71,363	12,753	4,201	16,954
Associates Degree	14,257	2,699	1,340	4,039
Bachelor's Degree	43,485	8,580	2,846	11,426
Master's Degree	23,223	3,701	1,022	4,723
Professional Degree	8,665	1,848	355	2,203
Doctorate Degree	4,625	786	94	880
<u>% of Total</u>				
Less than 9th Grade	9%	11%	5%	10%
Some High School (No Diploma)	22%	24%	10%	21%
High School Graduate	28%	27%	29%	28%
Some College (No Degree)	18%	16%	24%	17%
Associates Degree	4%	3%	8%	4%
Bachelor's Degree	11%	11%	16%	12%
Master's Degree	6%	5%	6%	5%
Professional Degree	2%	2%	2%	2%
Doctorate Degree	1%	1%	1%	1%

Source: BNIA-JFI, Claritas and Bureau of the Census

# Community Economic and Workforce Development Community Impact Analysis – 25<sup>th</sup> and Howard Street Project

## Construction Impacts

**Table 2**  
**25th and Howard Street Development**  
**Economic Impacts of Construction Expenditures**  
(Jobs and 2010\$)

<u>Construction Phase</u>	
<b>Direct Impact</b>	<b>\$92,550,000</b>
Output (\$s)	\$110,825,168
Employment (# of Jobs)	635
Employee Compensation (\$s)	\$36,171,677
Average Employee Compensation per Job (\$s)	\$56,954
Fiscal Impact (\$s)	\$2,313,233

Source: IMPLAN

## Operational Impacts

**Table 6**  
**25th and Howard Street Development**  
**Economic Impacts of Operations**  
(Jobs and 2010\$)

<u>Operational Phase</u>	
<u>In-Development Impacts</u>	
Direct Impact (\$s)	\$62,016,848
Direct Impact (# of Jobs)	733
Estimated Direct Employee Compensation (\$)	\$24,121,416
Average Direct Employee Compensation per Job (\$s)	\$32,908
<u>Total Impacts</u>	
Output (\$s)	\$74,586,161
Employment (# of Jobs)	815
Employee Compensation (\$s)	\$28,418,061
Average Employee Compensation per Job (\$s)	\$34,886
Fiscal Impact (\$s)	\$8,779,200

Source: IMPLAN

# National Data Sets

## Employment Data

County/City Level (2009)

- Bureau of Labor Statistics – [www.bls.gov](http://www.bls.gov)
- Maryland DLLR <http://www.dllr.md.gov/lmi/>

County and Zip code (2007)

- County Business Patterns – <http://www.census.gov/econ/cbp/>

Problem = Best Data are Available only at Higher Levels of Geography.  
Limited Neighborhood-level Data

## Workforce Data

County/City and PUMA (2008 - area with at least 100,000 people -- 5 in Baltimore City)

- U.S. Bureau of the Census – American Community Survey [http://factfinder.census.gov/home/saff/main.html?\\_lang=en](http://factfinder.census.gov/home/saff/main.html?_lang=en)

Problem = Best Data are Available only at Higher Levels of Geography. Limited Neighborhood-level Data

# National Data Examples

## Employment

2007 County Business Patterns											
Major Industry											
Total for ZIP Code 21201											
Number of establishments:											
Paid employees for pay period including March 12 (number):											
First-quarter payroll (\$1000):											
Annual payroll (\$1000):											
Number of Establishments by Employment-size class											
Industry C Industry Code Description											
-----	Total	Estabs	'1-4'	'5-9'	'10-19'	'20-49'	'50-99'	'100-249'	'250-499'	'500-999'	1000+
-----	Total	1423	668	282	194	171	59	28	12	6	3
22----	Utilities	3	0	0	0	1	1	0	1	0	0
23----	Construction	17	8	2	4	3	0	0	0	0	0
31----	Manufacturing	14	9	1	1	3	0	0	0	0	0
42----	Wholesale trade	28	13	6	4	5	0	0	0	0	0
44----	Retail trade	169	112	35	15	7	0	0	0	0	0
48----	Transportation & warehousing	9	5	0	0	1	3	0	0	0	0
51----	Information	32	14	3	5	7	2	0	1	0	0
52----	Finance & insurance	105	54	19	15	8	3	1	2	3	0
53----	Real estate & rental & leasing	72	41	13	10	5	3	0	0	0	0
54----	Professional, scientific & technical servi	327	166	54	48	35	17	6	1	0	0
55----	Management of companies & enterprises	18	5	3	2	5	2	0	1	0	0
56----	Admin, support, waste mgt, remediation ser	57	18	13	8	8	4	5	1	0	0
61----	Educational services	24	6	6	4	5	1	2	0	0	0
62----	Health care and social assistance	149	61	21	23	26	7	6	0	2	3
71----	Arts, entertainment & recreation	20	9	1	1	4	2	0	2	1	0
72----	Accommodation & food services	194	78	50	23	30	7	4	2	0	0
81----	Other services (except public administration	184	68	55	31	18	7	4	1	0	0
99----	Unclassified establishments	1	1	0	0	0	0	0	0	0	0

## Workforce Supply

<b>PUMA5 00804, Maryland</b>		
Selected Economic Characteristics: 2006-2008		
Data Set: <b>2006-2008 American Community Survey 3-Year Estimates</b>		
Survey: <b>American Community Survey</b>		
<b>EMPLOYMENT STATUS</b>	<b>#</b>	<b>%</b>
<b>Population 16 years and over</b>	<b>98,015</b>	<b>98,015</b>
In labor force	58,960	60.2%
Civilian labor force	58,862	60.1%
Employed	53,582	54.7%
Unemployed	5,280	5.4%
Armed Forces	98	0.1%
Not in labor force	39,055	39.8%
<b>Civilian labor force</b>	<b>58,862</b>	
Percent Unemployed	9.0%	
<b>OCCUPATION</b>	<b>#</b>	<b>%</b>
<b>Civilian employed population 16 years and over</b>	<b>53,582</b>	<b>53,582</b>
Management, professional, and related occupations	19,879	37.1%
Service occupations	12,273	22.9%
Sales and office occupations	12,193	22.8%
Farming, fishing, and forestry occupations	33	0.1%
Construction, extraction, maintenance and repair occupations	4,248	7.9%
Production, transportation, and material moving occupations	4,956	9.2%

# Community Level Data Sets

## Some Free National Data Available

Interesting Source of Local Data Available – At the Census LEHD Program

<http://lehd.did.census.gov/led/index.php>

- **Longitudinal Employer-Household Dynamics (LEHD)** combines federal and state administrative data on employers and employees with core Census Bureau censuses and surveys.
- **Local Employment Dynamics (LED)** has information about local labor market conditions.

### Tools

**Community Economic Development (CED) HotReport:** provides community and business leaders speedy access to economic development information. Topics include the economy, transportation, housing, schools, top industries, occupations, and more.

**QWI Online:** NAICS-based or SIC-based Quarterly Workforce Indicators by state, geographic grouping, industry, year and quarter, sex, age group, and ownership. Also includes net job gains and losses.

**OnTheMap:** An online mapping and reporting application showing where workers are employed and where they live with companion reports on worker characteristics and optional filtering by age, earnings, or industry groups. A total of 47 states are currently featured showing data for seven years (2002 through 2008). Version 4 was released in December 2009.

**Industry Focus:** This tool lets you determine the top industries for your local area and your local workers, focus in on a particular industry to see how it ranks among top industries, and also look at the characteristics of those who work in that industry



# Community Level Data Sets

## Some Free National Data Available

OnTheMap <http://lehdmap4.did.census.gov/themap4/>

- Data Available at the Census Tract and Lower
- **Home Area Profile Report** with data on total primary jobs by age, earnings,
- **Commute Shed Report** showing the location of employment for employed downtown residents by selected cities, counties, and states.

Limitations – Lack of Detailed Industry or Worker Data – Only Age (range), Earnings (range), Place of Work/Place of Residence, and Industry

Also – It's a bit hard to use!

# Community Level Data Sets

## Some Free National Data Available

## Employment (DPOB Study)

Item	2004	2005	2006	2007	2008	Change #	%
Total Employment	116,152	116,965	118,666	117,511	114,189	-1,963	-2%
Jobs by Worker Age							
Age 30 or younger	25,236	23,591	25,397	25,742	24,420	-816	-3%
Age 31 to 54	72,698	74,843	73,652	71,228	68,921	-3,777	-5%
Age 55 or older	18,218	18,531	19,616	20,541	20,848	2,630	14%
Jobs by Earnings Paid							
\$1,200 per month or less	18,715	16,176	17,014	15,575	14,514	-4,201	-22%
\$1,201 to \$3,333 per month	48,153	43,747	40,473	38,528	35,033	-13,120	-27%
More than \$3,333 per month	49,284	57,042	61,179	63,407	64,642	15,358	31%
Total Commuting From:							
Baltimore City	40,718	40,485	40,931	40,175	38,414	-2,304	-6%
Baltimore County	34,770	35,312	35,745	35,970	34,431	-339	-1%
Anne Arundel County	9,144	9,015	9,325	8,811	8,787	-357	-4%
Howard County	6,014	6,078	6,234	6,199	6,200	186	3%
Harford County	5,998	6,344	6,365	6,279	5,764	-234	-4%
Montgomery County	3,906	4,060	4,119	4,006	3,981	75	2%
Prince George's County	3,534	3,549	3,450	3,347	3,466	-68	-2%
Carroll County	2,974	3,069	3,154	2,992	2,896	-78	-3%
Other Maryland Counties	5,358	5,095	5,174	5,136	5,386	28	1%
Out of State	3,736	3,958	4,169	4,596	4,864	1,128	30%
Source: Census - LEHD							

## Workforce (DPOB Study)

Item	2004	2005	2006	2007	2008	Change #	%
Total Employed Residents	11,320	12,173	12,064	13,235	13,483	2,163	19%
Count							
Age 30 or younger	3,992	4,344	4,497	4,928	5,024	1,032	26%
Age 31 to 54	6,025	6,453	6,175	6,724	6,813	788	13%
Age 55 or older	1,303	1,376	1,392	1,583	1,646	343	26%
Count							
\$1,200 per month or less	2,507	2,746	2,485	2,499	2,296	-211	-8%
\$1,201 to \$3,333 per month	4,723	4,644	4,294	4,589	4,426	-297	-6%
More than \$3,333 per month	4,090	4,783	5,285	6,147	6,761	2,671	65%
Total Employed in: <sup>1</sup>							
Baltimore City	5,859	6,296	6,157	6,698	6,909	1,050	18%
Baltimore County	1,905	2,083	2,150	2,539	2,659	754	40%
Anne Arundel County	1,158	1,289	1,080	1,209	1,184	26	2%
Howard County	568	587	664	760	787	219	39%
Montgomery County	591	635	646	640	591	0	0%
Prince George's County	403	435	480	451	390	-13	-3%
Other Maryland Counties	611	613	644	708	687	76	12%
Out of State	225	235	243	230	276	51	23%
Source: Census - LEHD							

# Community Level Data Sets

## Other Data – Commercial Databases

Much of the Core Government Data is Unavailable at Detailed Levels of Geography

- Employer Data Especially is Impossible to Obtain
- Demographic Data – Lagged/Lack of Geographic Detail

As a Result – Analyses Often Have to Rely on Third-Party Commercial Databases

- D&B/InfoUSA for Employer Data
  - Has Lots of Information – Employment/Revenues **BUT** Has Many Inaccuracies
- Claritas for Demographic Data
  - Core Census Indicators – **BUT** Based on an Estimation Model

Commercial Databases can be **Expensive** and **Inaccurate**

But are often BAD – **B**est **A**vailable **D**ata – But are Better than Nothing!

# Community Level Data Sets

## Other Data – Commercial Databases

### Employment -

**Table 2**  
**The Role of Downtown in Baltimore's Economy**  
**Total Baltimore City and Downtown Area Employment**

	Baltimore	Downtown Baltimore	Downtown As a % of Baltimore
Total	422,139	113,453	27%
Natural Resources	16	0	0%
Mining	1	0	0%
Utilities	3,755	1,175	31%
Construction	14,080	4,592	33%
Manufacturing	17,542	1,453	8%
Wholesale Trade	9,696	689	7%
Retail trade	21,486	4,400	20%
Transportation & Warehousing	11,462	1,103	10%
Information	6,669	2,750	41%
Finance & Insurance	18,954	10,466	55%
Real Estate & Rental	9,232	2,575	28%
Professional Scientific & Technical Services	41,353	12,915	31%
Management of Companies	1,249	491	39%
Administrative & Waste Services	26,122	2,176	8%
Educational Services	28,847	11,026	38%
Health & Social Services	70,676	16,812	24%
Arts, Entertainment & Recreation	19,060	2,962	16%
Accommodation & Food Services	23,227	9,398	40%
Other Services	21,350	3,029	14%
Government	77,361	25,441	33%

Source: IMPLAN, DPOB and the JFI

### Workforce - Claritas

**Table 14**  
**Income - Red Line Communities**

Income Indicators	Total Baltimore City	Redline Baltimore City	Redline Baltimore County	Total Redline
Per Capita Income	\$20,316	\$20,722	\$23,249	\$20,751
Median Household Income	\$33,769	\$31,286	\$50,456	\$32,300
Average Household Income	\$47,417	\$45,266	\$58,521	\$46,319

Source: BNIA-JFI, Claritas and Bureau of the Census

# Community Level Data Sets

## Some Economic Development Estimation Techniques

### Some General Rules of Thumb you Can Use

- Jobs can be Estimated based on Standard Relationships of Employment to Sq. Ft. of Building Size
  - 1 Job / 250 sq. ft. of Office Space
  - 1 Job / 450 sq. ft. of Retail Space
  - 1 Job / 1,000+ sq. ft. of Manufacturing/Distribution Space

One Source – U.S. D.O.E. - E.I.A.

[http://www.eia.doe.gov/emeu/cbecs/cbecs2003/detailed\\_tables\\_2003/detailed\\_tables\\_2003.html](http://www.eia.doe.gov/emeu/cbecs/cbecs2003/detailed_tables_2003/detailed_tables_2003.html)

- Earnings can be Estimated from Federal/State Data
- Company Revenues Estimated by Government and Private Sources
  - General Company Revenues -- \$ per Worker – U.S. Bureau of Economic Analysis
  - Retail Sales \$ per sq. ft. - *Dollars & Cents of Shopping Centers*  
<http://www.icsc.org/cgi/displaybook/000300>

# Importance of Original Data Collection

## Communities / Neighborhood Organizations Should Get to Know Their Businesses

- Employer Surveys – ask about Employment, Revenues, Other Issues;
- Storefront Surveys – Occupancy/Vacancy
- Community Assets – Job Training, Social Services, Other?

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